ONERESPONDER

User Reference Guide:

Responder Portal PTB

Management

onerresponder.net

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Contents

Glossary

Acronyms

- PTB = Position Task Book
- NQS = National Qualification System
- EOC = Emergency Operations Center

Term Definitions

Position Task Book

A Position Task Book documents the performance criteria that a Trainee/Candidate must meet to be considered qualified to hold a Position, either within the National Qualifications System or as determined by their jurisdiction.

PTB Evaluator

A PTB Evaluator is an individual who has access to view their Trainee/Candidate's PTB and can also review the requisites and endorse their Trainee/Candidate's proficiency following successful demonstration of required Task behaviors. An PTB Evaluator is someone who is considered Qualified, meaning they hold the Position at the issued level or higher and thus possess the earned experience necessary to be an appropriate evaluator for the PTB, or Authorized, meaning they have been designated by their organization administrators as holding the appropriate authority to serve as an evaluator for the PTB.

PTB Owner

A PTB Owner is a Responder who has been issued a PTB and is working to complete all qualification requirements to hold the corresponding Position.

Trainee/Candidate

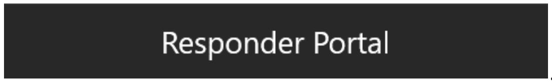
If you are assigned or requested to serve as a PTB Evaluator for an individual, they are considered to be your Trainee/Candidate for the duration of the time you serve as an Evaluator on their PTB.

PTB Management as a PTB Owner

As a PTB Owner, Responders can review their progress as their organization administrators and PTB Evaluators award them Training and endorse their required Tasks. They are unable to award themselves Training or endorse Task for their own PTB, however, they can review all requirements from their Responder Portal.

Request a PTB Evaluator

OneResponder allows individuals to request another individual serve as an evaluator for their PTB.

1. Log in to 

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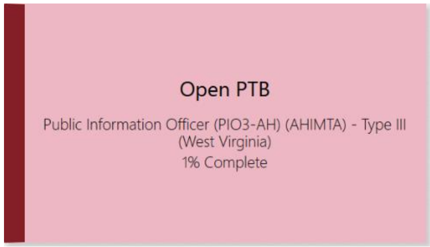
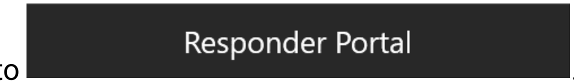
2. Locate and select 

to be navigated to your open PTB.
    a. If you have more than one open PTB, you will be taken to a list page where you can then choose the appropriate PTB by selecting .
3. Locate the “PTB Evaluators” menu bar.
    a. Select to expand the table and view all Evaluators who have contributed to the PTB.

4. Select Manage on the far-right of the menu bar. This will navigate you to a page titled "Manage PTB Evaluators."
5. In the top right corner of the page, locate and select Request Evaluator. This will open a modal containing a list of all personnel in your organization eligible to serve as an evaluator for this PTB.
   a. Qualified evaluators are those individuals who hold the Position at the level you're working through or above. They are able to serve as a PTB Evaluator because they possess the necessary experience to appropriately evaluate candidate performance as they work through a PTB.
   b. Authorized evaluators are those individuals who have been designated by their organization administrators as holding the appropriate authority to review candidate performance as they work through a PTB.
   c. Your organization administrators may also be requested as PTB Evaluators, regardless of their Qualified or Authorized status.
   d. If you want to request someone as an evaluator who is not an individual within your organization, utilize the quick-search tool to search for that individual using their full email address.
      i. The individual must have an account in OneResponder in order to be assigned as a PTB Evaluator.
      ii. An individual requested by email search must be either qualified or authorized to serve as an evaluator for the position.
6. Click Select to the left of the appropriate individual.
7. Select Request in bottom right of modal to confirm your request.
   a. This will initiate a workflow request that must be approved by the requested individual.

i. Once they accept the request, that individual will be confirmed as an Evaluator for your PTB, and they will be able to view your PTB and endorse tasks once you have proficiently completed their requirements.

Release a PTB Evaluator

1. Log in to 

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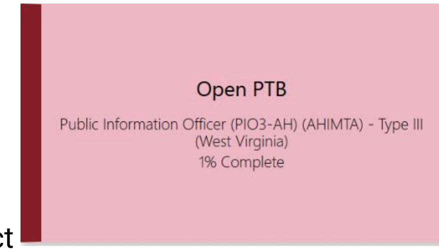
2. Locate and select 

to be navigated to your open PTB.
    a. If you have more than one open PTB, you will be taken to a list page where you can then choose the appropriate PTB by selecting .
3. Locate the “PTB Evaluators” menu bar.
    a. Select to expand the table and view all Evaluators who have contributed to the PTB.
4. Select 

on the far-right of the menu bar. This will navigate you to a page titled “Manage PTB Evaluators.”

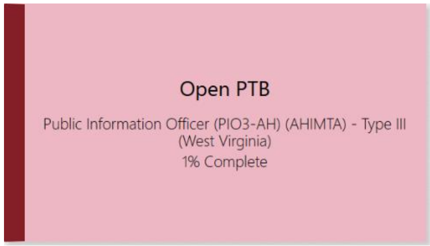
a. Those individuals who are currently serving as an Evaluator for your PTB will be displayed in the grid titled "PTB Evaluators."

5. Locate the appropriate individual and select Release.
6. You will be prompted to confirm your choice.
   a. If you select Yes, the individual will be released as an Evaluator from your PTB.
      i. Once removed, the individual will no longer have access to your PTB to endorse Tasks as you complete them.
      ii. If the individual has endorsed at least one Task on your PTB, they will remain displayed in the PTB Evaluators grid, with a status: Inactive.
      iii. If the individual has not endorsed anything on your PTB, they will not be displayed in the PTB Evaluators grid.

      Please Note: You are able to have an individual serve as an Evaluator multiple times on your PTB, if appropriate. In order to request that an individual return as an Evaluator once they have been released, follow the 'Request a PTB Evaluator' process as demonstrated in the previous section.

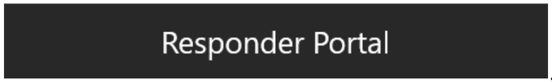
   b. If you select No, no action will be taken.

View PTB Trainings

1. Log in to Responder Portal.
2. Locate and select 

to be navigated to your open PTB.
    a. If you have more than one open PTB, you will be taken to a list page where you can then choose the appropriate PTB by selecting .
3. Locate the "Training" menu bar.
4. Select to activate the dropdown on the Training menu bar. This will display a list of all Training requirements for the PTB, as well as your status as either Complete or Incomplete.
    a. Those training courses that have been completed will also display a timestamp of when the training course was awarded to you.
        i. You may see a date of Training Completion that predates issuance of this PTB. If you have been awarded a training course and its expiration date has not yet passed, it will display on any PTB as Completed with the date of initial award.

View PTB Tasks

1. Log in to 

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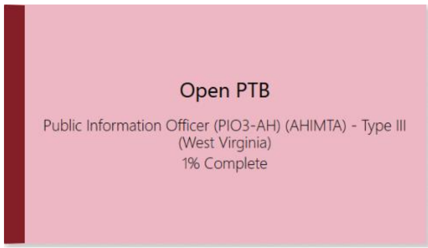
2. Locate and select 

to be navigated to your open PTB.
   a. If you have more than one open PTB, you will be taken to a list page where you can then choose the appropriate PTB by selecting .

3. Locate the “Behaviors and Tasks” menu bar.

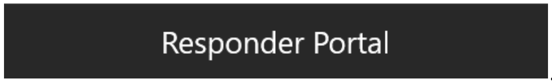
4. Select to activate the dropdown on the Behaviors and Tasks menu bar.

5. Tasks are sorted by Competency and Behavior in OneResponder. To view specific Tasks, click to expand a Competency and Behavior category.
   a. Each task will be displayed with the Completion Codes that define the parameters under which the tasks must be performed in order to be endorsed as Complete, as well as their status as Complete or Incomplete.

5. You are able to view more details about a task by selecting to its left. This will navigate you to a page listing all information about the task, including, upon endorsement, the Completion Code defining its endorsement, and any comment added by the individual who provided the task endorsement.

View PTB Additional Qualification Requirements

Organizations have the ability to add requirements to a PTB that cannot be defined as either task or training requirements. These are “Additional Qualification Requirements,” and can be added to any PTB.

1. Log in to 

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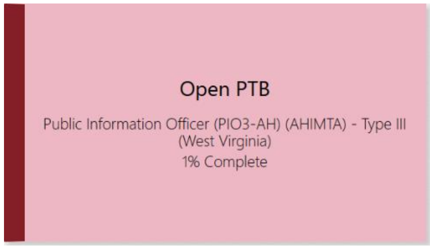
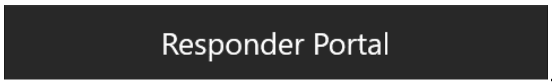
2. Locate and select 

to be navigated to your open PTB.
    a. If you have more than one open PTB, you will be taken to a list page where you can then choose the appropriate PTB by selecting .
3. Locate the “Additional Qualification Requirements” menu bar.
4. Select to expand the grid and view any additional requirements included on the PTB, as well as their status as either Complete or Incomplete.

   Additional Qualification Requirements differ from Tasks in that they can be endorsed as soon as they are completed for their PTB and are not beholden to any completion codes.

View PTB Skillsets

Organizations also have the ability to add NQS Skillsets as requirements to a PTB. These skillsets have been published by FEMA NQS and are comprised of tasks that must be completed in order to fully progress through the skillset.

1. Log in to 

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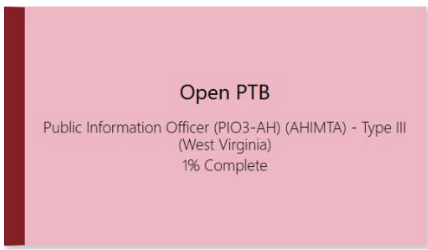
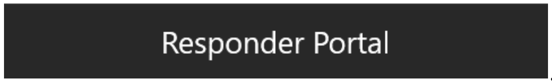
2. Locate and select 

to be navigated to your open PTB.
   a. If you have more than one open PTB, you will be taken to a list page where you can then choose the appropriate PTB by selecting .
3. Locate the “Skillsets Tasks” menu bar.
   a. Note: This grid will only be visible if there has been a Skillset added to the PTB.
4. Select to expand the grid and view those Skillsets that have been added to the PTB.
5. Skillset Tasks are grouped under their Skillsets and displayed similarly to the standard PTB Tasks. Select to the left of the Skillset to expand it and view all Tasks that comprise it.
6. You are able to view more details about a Skillset Task by selecting . This will navigate you to a page listing all information about the task, including, upon endorsement, the Completion Code defining its endorsement, and any comment added by the individual who provided the Skillset Task endorsement.

Add Comments

Those individuals working through a PTB are called "PTB Owners" in OneResponder. PTB Owners are able to record comments on their PTB, all of which will be viewable by anyone who has access to the PTB.

Note: You cannot delete or retract a comment once it has been submitted. Any comments submitted are visible to all who have access to the Position Task Book and are permanent.

1. Log in to 

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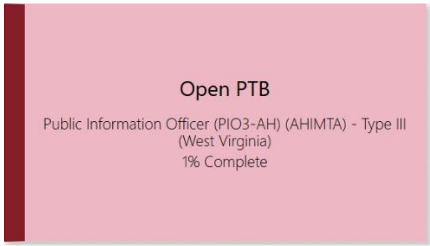
2. Locate and select 

to be navigated to your open PTB.
    a. If you have more than one open PTB, you will be taken to a list page where you can then choose the appropriate PTB by selecting .
3. Locate the "Comments" menu bar.
4. Select to expand the grid and view all comments that have been previously added to the PTB.
5. To record a new comment, select 

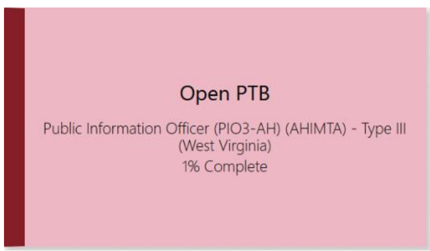
on the far-right of the menu bar. This will open a text-input modal.
6. Type in your comment into the text input field.
7. Select 

in the bottom right of the modal. This will add the comment to your PTB.
    a. Once you select Save, this will add the comment to the PTB, and all personnel who have access to your PTB will be able to view the comment.

Attach Documents

PTB Owners can attach documents to the PTBs that are viewable by anyone who has access to the PTB.

Note: Once you have uploaded an attachment to your task book, it cannot be removed, and all attachments will be visible to all personnel who have access to the PTB. Please ensure you upload the correct attachment.

1. Log in to Responder Portal.
2. Locale and select 

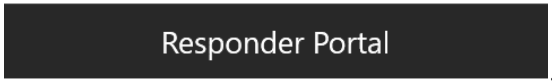
to be navigated to your open PTB.
    a. If you have more than one open PTB, you will be taken to a list page where you can then choose the appropriate PTB by selecting .
3. Locate the "Documents" menu bar.
4. Select ^ to expand the grid and view a list of all documents that have previously been attached to the PTB.
    a. You are able to download a copy of each attachment by clicking its name.
5. To add a new attachment, select Attach Document on the far-right of the Documents menu bar. This will open a modal containing a document upload tool and an optional comment box.
6. Search for the appropriate document on your computer by clicking Select File.
7. If you would like to a add a comment to contextualize your attachment, type it into the Comment field.
8. Select ✔ Save in the bottom right of the modal. This will confirm your upload and attach the document to your PTB.
    a. Once you select Save, this will attach the document to the PTB, and all personnel who have access to your

PTB will be able to view the contextualizing comment and download a copy of the attachment.

Send Messages

PTB Owners can send messages to their Organization Training and Qualifications Managers and their PTB Evaluators, if any are assigned.

Note: Message recipients are notified via email that they have received a message relating to their Position Task Book, and all Messages corresponding to a PTB are stored in the Messages table. All messages will be visible to all who have access to the Position Task Book and are permanent to facilitate collaboration.

1. Log in to 

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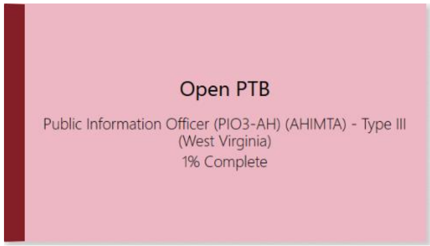
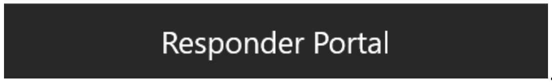
2. Locate and select 

to be navigated to your open PTB.
    a. If you have more than one open PTB, you will be taken to a list page where you can then choose the appropriate PTB by selecting .

3. Locate the “Messages” menu bar.
4. Select to expand the grid and view a list of all messages that have previously been sent. All messages will be visible, along with the date upon which they were sent and the selected recipient group(s).
5. To send a new message, select **Send Message** on the far-right of the menu bar. This will open a modal containing a comment box and a checkbox selection of possible recipient groups.
6. Type the message into the comment field.
7. Using , select the appropriate recipient group. You are able to select multiple recipients if necessary. To do so, select as many checkbox options as appropriate.
    a. If you do not have at least one PTB Evaluator with a validated email address, you will be unable to select PTB Evaluator(s) as a message recipient group.
    b. If your organization does not have any personnel assigned as Qualifications Managers or Training Managers, your Organization Manager(s) will receive the messages instead.
8. Once you have finished typing your message and have selected the appropriate recipient group(s), click **Send** at the bottom right of the modal to send your message.
    a. Once a message has been sent, the recipient(s) will be notified via email of the new message. The message will also be recorded in the Messages grid, and all personnel who have access to your PTB will be able to view the message.

Submitting a Completed PTB for Review

Once you have completed all requirements comprising a PTB, you are then able to submit it for review by your organization administration. After you submit it for review and your administrators approve it, you will be awarded the position, but you will always maintain access to the PTB to review the full history of your qualification to hold the position.

1. Log in to 

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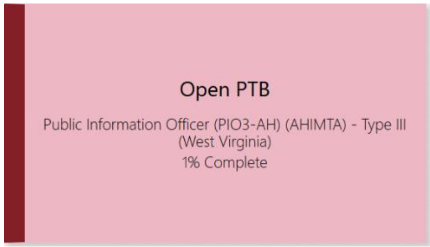
2. Locate and select 

to be navigated to your open PTB.
    a. If you have more than one open PTB, you will be taken to a list page where you can then choose the appropriate PTB by selecting .
3. If all requirements have been endorsed or awarded as complete, you will see 

in the top right of the page.
    a. This button will only appear after all requirements for a PTB are complete.
4. Review all components of the PTB. You are able to add any additional comments or documentation to the PTB.
5. Once you are satisfied that all appropriate information has been included, select 

.
6. This will open a warning modal asking you to confirm your choice.
    a. If you select 

, this will confirm your submittal. Your organization administrators will be notified via email that they have a PTB to review.
        i. OneResponder maintains a flexible infrastructure that allows each jurisdiction to maintain its current PTB review process. Once

an organization reaches a decision as to an individual's PTB, the process to implement that decision is straightforward – for more information about approving a PTB, please review User Guide: Organization Manager PTB Management.

b. If you select Go Back, no action will be taken and the PTB will remain in an open state and ready to submit.

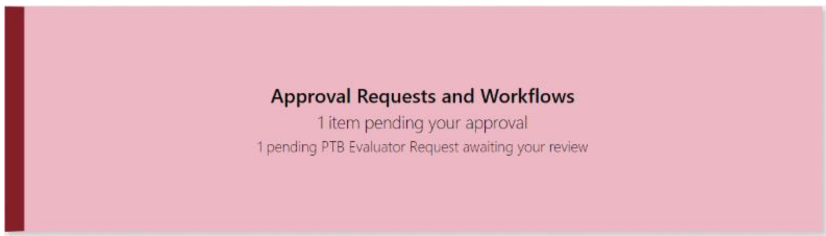
PTB Management as a PTB Evaluator

Once assigned as a PTB Evaluator for a Trainee/Candidate, individuals are able to perform a number of actions as their Trainee/Candidate works through their assigned PTB. The following actions all performed in the OneResponder Responder Portal.

Respond to a PTB Evaluator Request

If you have been requested by an individual to serve as an Evaluator on their PTB, you will receive an email notification to inform you of the new request, which can be viewed in the Responder Portal.

1. Log in to Responder Portal.
2. Locate and select



   to view any active requests requiring your review.
   a. This tile will only appear if you have at least one workflow requiring your approval.
      i. Please note: All workflows for which are available for your review will be consolidated within this tile.
3. Select to view the details of the workflow request.
   a. You will be able to view the name and organization of the individual initiating the request, as well as the position the individual is working toward.
4. To approve the request, select Approve.
   a. You will be prompted with a modal asking you to confirm your approval.
      i. Type a comment in the text input field to contextualize your approval.
      ii. Select ✔ Approve to confirm your approval. The individual initiating the request will be notified via email that their request was approved.
      iii. Once you accept the request, you will be able to view the individual's PTB and, when appropriate, endorse Tasks as complete.
5. To reject the request, select Reject.
   a. You will be prompted with a modal asking you to confirm your rejection.

i. Type a comment in the text input field to contextualize your rejection.

ii. Select ✖ Reject to confirm your rejection.

iii. The individual initiating the request will be notified via email that their request was rejected, and you will be granted no access to the individual's PTB.

Endorse PTB Tasks

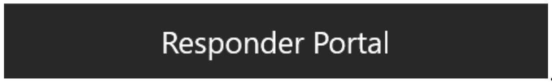
1. Log in to Responder Portal.
2. Locate and select 

to be navigated to the PTB for which you are serving as an Evaluator.
    a. If you have more than one Trainee/Candidate, you will be taken to a list page where you can then select the appropriate PTB using .
3. Locate the "Behaviors and Tasks" menu bar.
4. Select to expand the table and view the tasks comprising the PTB.
    a. All tasks are sorted by competencies and behaviors. To view individual tasks, select to expand the behaviors.

5. If your candidate has successfully performed a task and you need to endorse it, select Grant Endorsements on the far-right of the menu bar.
6. You will be prompted with a modal to identify the appropriate completion code for your endorsement.
    a. In OneResponder, tasks are categorized by completion code, and must be performed under specific parameters in order to be considered successfully demonstrated.
7. Add additional event information in the text input field to contextualize your endorsement.
8. Click OK to view a list of all unendorsed tasks which are applicable to be endorsed under the selected completion code.
    a. Tasks are sorted by Competency and Behavior. Select + to expand each group and view individual tasks.
9. Locate the appropriate task and click Select to the left of the task.
    a. If necessary, you are able to select multiple tasks for endorsement during the same session.
10. Select Endorse at the top of the page.
11. You will be prompted with a confirmation modal asking you to contextualize your endorsement.
    a. The modal will display several fields of information, including the date of endorsement and the number of endorsements being granted.
    b. Add a contextualizing comment to your endorsement.
        i. If you have selected multiple tasks for endorsement, your contextualizing comment will be applied to all selected tasks.
    c. Select OK to confirm your endorsement(s). This will update the individual's PTB to display the task as complete, both in your view as an Evaluator and on the individual's Responder Portal.

Endorse Additional Qualification Requirements

Organizations do have the ability to add requirements to a PTB that cannot be defined as either task or training requirements. These are "Additional Qualification Requirements," and can be added to any PTB. Once added, they must be completed in order for an individual to progress through their PTB. The process to endorsing additional qualification requirements is very similar to endorsing tasks, though no completion codes are required to frame the endorsement.

1. Log in to 

.
2. Locate and select 

to be navigated to the PTB for which you are serving as an Evaluator.
    a. If you have more than one Trainee/Candidate, you will be taken to a list page where you can then select the appropriate PTB using .
3. Locate the "Additional Qualification Requirement" menu bar.
4. Select to expand the table and view the additional qualification requirements included in the position.
    a. Additional qualification requirements are grouped by Qualification Type. Select to expand each group and view individual requirements.
5. If your candidate has successfully completed a requirement, select 

on the far-right of the menu bar.
6. This will navigate you to a list of all additional qualification requirements that have not yet been endorsed.
    a. Additional qualification requirements are grouped by Qualification Type. Select to expand each group and view individual requirements.

7. Locate the appropriate requirement and click **Select** to the left of the requirement.
   a. If necessary, you are able to select multiple requirements for endorsement.
8. Select **Endorse** at the top of the page.
   a. The modal will display several fields of information, including the date of endorsement and the number of requirements being endorsed.
   b. Add a contextualizing comment to your endorsement.
      i. If you have selected multiple requirements for endorsement, your contextualizing comment will be applied to all selected requirements.
   c. Select **✔ Endorse** to confirm your endorsement(s). This will update the individual's PTB to display the task as complete, both in your view as an Evaluator and on the individual's Responder Portal.

Endorse PTB Skillsets

Organizations also have the ability to add NQS Skillsets as requirements to a PTB. These Skillsets are published by FEMA NQS and are comprised of Tasks that must be completed in order to fully progress through the Skillset.

1. Log in to **Responder Portal**.
2. Locate and select

   to be navigated to the PTB for which you are serving as an Evaluator.
   a. If you have more than one Trainee/Candidate, you will be taken to a list page where you can then select the appropriate PTB using 🔍.
3. Locate the "Skillsets" menu bar.

a. Note: This grid will only be visible if there has been a Skillset added to the PTB.

4. Select ^ to expand the grid and view those Skillsets that have been added to the PTB.
   a. Skillset Tasks are grouped under their Skillsets and displayed similarly to the standard PTB Tasks. Select + to the left of the Skillset to expand it and view all Tasks that comprise it.
5. If your candidate has successfully completed a skillset task, select Grant Endorsements on the far-right of the menu bar.
6. You will be prompted with a modal to identify the appropriate completion code for your endorsement.
   a. In OneResponder, skillset tasks are categorized by completion code, and must be performed under specific parameters in order to be considered successfully demonstrated.
7. Add additional information in the text input field to contextualize your endorsement.
8. Select OK to view a list of all unendorsed skillset tasks which are able to be endorsed under the selected completion code.
   a. Skillset tasks are sorted by Skillset and Skillset Type. Select + to expand each group and view individual skillset tasks.
9. Locate the appropriate skillset task and click Select to the left of the task.
   d. If necessary, you are able to select multiple tasks for endorsement during the same session.

12. Select Endorse at the top of the page.
13. You will be prompted with a confirmation modal asking you to contextualize your endorsement.
   a. The modal will display several fields of information, including the date of endorsement and the number of endorsements being granted.
   b. Add a contextualizing comment to your endorsement.

i. If you have selected multiple skillset tasks for endorsement, your contextualizing comment will be applied to all selected tasks.

c. Select 

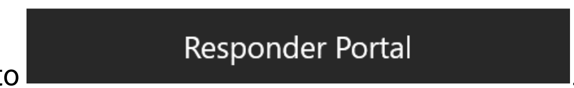
to confirm your endorsement(s). This will update the individual's PTB to display the skillset task as complete, both in your view as an Evaluator and on the individual's Responder Portal.

Update the Status of PTB Training Requirements

If an individual serving as a PTB Evaluator for a Trainee/Candidate also holds an administrative role as an Organization Manager or a Training Manager, they will be able to update training progress on their Trainee/Candidate's PTB from the Responder Portal by either awarding it as Complete or Waiving the requirement.

*Note: These actions can **only** be completed by personnel who hold an admin role as either an Organization Manager or a Training Manager.*

Award a Training Course

1. Log in to 

.
2. Locate and select 

to be navigated to the PTB for which you are serving as an Evaluator.

a. If you have more than one Trainee/Candidate, you will be taken to a list page where you can then select the appropriate PTB using .

3. Locate the "Training" menu bar.

a. Select to expand the table and view all training requirements for the PTB, including their status as complete or incomplete.

b. An individual may have training that displays a completion date that predates the PTB being issued to them. If they have completed a training course and its expiration date has not yet passed, that training will be displayed as complete on all PTBs that are issued until the expiration date.

4. Select Award Training on the far-right of the menu bar to be navigated to a list of all training courses that have not yet been awarded as complete.

5. Click Select to choose the appropriate training course.

a. If necessary, you are able to select multiple training courses for award during the same session.

6. Select Endorse at the top of the page.

7. You will be prompted with a confirmation modal asking you to contextualize your award.

a. The modal will include an editable field for "Award Date," which defaults to the current date. If necessary, you are able to select a new date, either by typing the date into the text input field or selecting it from the calendar dropdown.

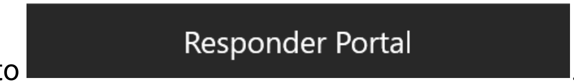
b. Add a comment to contextualize your training award.

i. If you have selected multiple courses for your training award, your contextualizing comment will be applied to all selected training courses.

c. Select Award to confirm your award(s). This will update the individual's PTB to display the training(s) as complete, both in your view as an Evaluator and on the individual's Responder Portal.

i. Once a training has been awarded, it will also update as complete on any other in-progress PTB(s) issued to the individual that include the training as a requirement.

Waive a Training Course

1. Log in to 

.
2. Locate and select 

to be navigated to the PTB for which you are serving as an Evaluator.
    a. If you have more than one Trainee/Candidate, you will be taken to a list page where you can then select the appropriate PTB using  .
3. Locate the “Training” menu bar.
    a. Select  to expand the table and view all training requirements for the PTB, including their status as complete or incomplete.
    b. An individual may have training that displays a completion date that predates the PTB being issued to them. If they have completed a training course and its

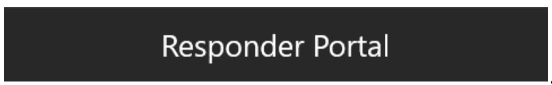
expiration date has not yet passed, that training will be displayed as complete on all PTBs that are issued until the expiration date.

4. Select **Award Training** on the far-right of the menu bar to be navigated to a list of all training courses that have not yet been awarded as complete.
5. Click **Select** to choose the appropriate training course.
    a. If necessary, you are able to select multiple training courses to waive during the same session.
6. Select **Waive** at the top of the page.
7. You will be prompted with a confirmation modal asking you to contextualize your waiver.
    a. The modal will display several fields of information, including the Waiver Date, indicating the date the training
    b. Add a comment to contextualize your waiver.
    c. Select **Waive** to confirm your waiver(s). This will update the individual's PTB to display the training(s) as waived, both in your view as an Evaluator and on the individual's Responder Portal.

Add Comments

PTB Evaluators are able to add comments to their Trainee/Candidate's PTB(s). These comments will be visible to all personnel who have access to the PTB.

Note: You cannot delete or retract a comment once it has been submitted. Any comments submitted are visible to all who have access to the Position Task Book and are permanent.

1. Log in to 

.
2. Locate and select 

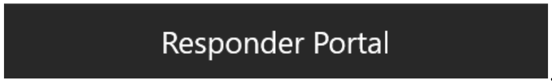
to be navigated to the PTB for which you are serving as an Evaluator.
   a. If you have more than one Trainee/Candidate, you will be taken to a list page where you can then select the appropriate PTB using .
3. Locate the "Comments" menu bar.
4. Select ^ to expand the grid and view all comments that have been previously added to the PTB.
5. To record a new comment, select the "Record Comment" on the far-right of the menu bar. This will open a text-input modal.
6. Type in your comment into the text input field.
7. Select 

in the bottom right of the modal. This will add the comment to your PTB.
   a. Once you select Save, this will add the comment to the PTB, and all personnel who have access to the PTB will be able to view the comment.

Attach Documents

PTB Evaluators can attach documents to their Trainee/Candidate's PTB(s). These attachments will be visible to all personnel who have access to the PTB.

Note: Once you have uploaded a document to your task book, it cannot be removed. Please ensure you upload the correct document.

1. Log in to 

.
2. Locate and select 

to be navigated to the PTB for which you are serving as an Evaluator.
    a. If you have more than one Trainee/Candidate, you will be taken to a list page where you can then select the appropriate PTB using .
3. Locate the "Documents" menu bar.
4. Select to expand the grid and view a list of all documents that have previously been attached to the PTB.
    a. You are able to download a copy of each attachment by clicking its name.
5. To add a new attachment, select 

on the far-right of the Documents menu bar. This will open a modal containing a document upload tool and an optional comment box.
6. Search for the appropriate document on your computer by clicking 

.
7. If you would like to a add a comment to contextualize your attachment, type it into the Comment field.
8. Select 

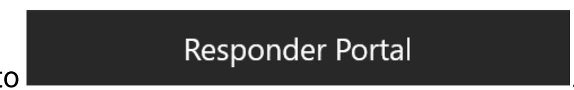
in the bottom right of the modal. This will confirm your upload and attach the document to your PTB.
    a. Once you select Save, this will attach the document to the PTB, and all personnel who have access to the PTB

will be able to view the contextualizing comment and download a copy of the attachment.

Send Messages

PTB Evaluators can send messages to all personnel involved in Trainee/Candidate's PTB, including the PTB Owner and the PTB Owner's Organization Qualification and Training Managers. These messages will be sent to the selected recipients and will also be visible to all personnel who have access to the PTB.

Note: Message recipients are notified via email that they have received a message relating to their Position Task Book, and all Messages corresponding to a PTB are stored in the Messages table. All messages will be visible to all who have access to the Position Task Book and are permanent.

1. Log in to 

.
2. Locate and select 

to be navigated to the PTB for which you are serving as an Evaluator.

a. If you have more than one Trainee/Candidate, you will be taken to a list page where you can then select the appropriate PTB using .

3. Locate the "Messages" menu bar.
4. Select to expand the grid and view a list of all messages that have previously been sent. All messages will be visible, along with the date upon which they were sent and the selected recipient group(s).
5. To send a new message, select Send Message on the far-right of the menu bar. This will open a modal containing a comment box and a checkbox selection of possible recipient groups.
6. Type the message into the comment field.
7. Using , select the appropriate recipient group. You are able to select multiple recipients if necessary. To do so, select as many checkbox options as appropriate.
   a. The individual working through the PTB is considered the PTB Owner.
   b. If your Trainee/Candidate's organization does not have any personnel assigned as Qualifications Managers or Training Managers, their Organization Manager(s) will receive the messages instead.
8. Once you have finished typing your message and have selected the appropriate recipient group(s), click Send at the bottom right of the modal to send your message.
   a. Once a message has been sent, the recipient(s) will be notified via email of the new message. The message will also be recorded in the Messages grid, and all personnel who have access to the PTB will be able to view the message.